

Block Enrollment

Special Registrations and/or Cohort Registrations may be processed using the Block Enrollment option within PeopleSoft. With this process,

- 1) A student block is set up with a group of students using the Create Student Block page.
- 2) A class block is then created using the Create Class Block page with one or more classes attached to the block.
- 3) The final step is the merging of the two blocks through the use of the Block Enroll Merge component.

While this process will enroll the students in classes, the Optional Fees and Student Hospitalization Insurance processes will need to be addressed individually through the Enrollment Request component. Or, students have the option to enter this information themselves via the One Stop web site.

Note: At this time, the Block Enrollment posting process allows up to 250 enrollment transactions at one time. Keep this number in mind as you set up student and course blocks.

Create Student Block:

To create a new student block or update an existing block follow the path below

Records and Enrollment > Enroll Students > Block Enrollment > Create Student Block

1. Select **Add a New Value** link.
2. Name the Student Enrollment Block (5 characters is the maximum).
3. Click **Add** button.

OR

To update/edit an existing Student Block select the “Find an Existing Value” tab and enter a previously created Student Enrollment block code

Create Student Block

[Find an Existing Value](#) [Add a New Value](#)

Academic Institution: 

Student Enrollment Block:

[Find an Existing Value](#) | [Add a New Value](#)

Block Enrollment Students

1. Student Enrollment Block – Enter a description for your Student Enrollment Block.
2. Enter ID# and Academic Career for each student. Click on Add Row button to add rows for additional students.
3. **Save** the Block Enrollment Students page.

Block Enrollment Students

Academic Institution: UMNTC Univ of Minnesota, Twin Cities

Student Enrollment Block: YSB9 *Description:

*ID		*Academic Career	
<input type="text" value="2114840"/>	Tom Peterson	<input type="text" value="UGRD"/>	Undergrad
<input type="text" value="2200365"/>	Mary Smith20	<input type="text" value="UGRD"/>	Undergrad
<input type="text" value="2202230"/>	Jon Lea	<input type="text" value="UGRD"/>	Undergrad

Go to: [Add Merge Process](#)

Note: If a class block has already been created you may use the **Add Merge Process** link at the bottom of the page to go directly to the Block Enrollment component or you may navigate to the page.

Block Enrollment Classes

Records and Enrollment> Enroll Students> Block Enrollment> Create Class Block

1. Select **Add a New Value** link.
2. Enter the Institution
3. Name the Class Enrollment Block (5 characters is the maximum).
4. Click **Add** button.

OR

To update/edit an existing Class Block select the “Find an Existing Value” tab and enter a previously created Class block code.

Create Class Block

[Find an Existing Value](#) [Add a New Value](#)

Academic Institution: 

Class Enrollment Block:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Block Enrollment Classes

Once you're in the Block Enrollment Classes page:

1. Block Enrollment Classes – Enter a description for Class Block.
2. Enter the Term and Class Number. Click on Add Row button to add rows for additional classes.
3. Select any appropriate course overrides (i.e., Action Date etc.).
4. **Save** the Block Enrollment Classes page.

Block Enrollment Classes page

Block Enrollment Classes

Academic Institution: UMNTC Univ of Minnesota, Twin Cities
Class Enrollment Block: YCB9 *Description: Your Class Block Fall Sem

The screenshot shows a web interface for managing class blocks. At the top, there are fields for 'Academic Institution' (UMNTC) and 'Class Enrollment Block' (YCB9). Below this is a table with the following columns: *Term, *Action, Class Nbr, Grading Basis, Units, Crse Count, Related 1, and Related 2. The first row contains the values: 1069, Enroll, 33167, A-F, 4.00, 1.00, and empty fields for Related 1 and Related 2. Below the table, there are fields for 'Reason Drop if Enroll', 'Grade In', 'Hist', '1011', '002', 'World History I', 'Regular', and 'Undergrad'. There are also fields for 'Transcript Note ID', 'Repeat Code', and 'Instructor ID'. Below these are two sections: 'Overrides' and 'Requirement Designation'. The 'Overrides' section contains several checkboxes: Action Date, Appointment, Career, Class Limit, Class Links, Class Units, Class Permission, Class Permission, Class Units, Grading Basis, Service Indicator, Requisites, TimeConflict, Unit Load, and Wait List Okay. The 'Requirement Designation' section contains a checkbox for 'Ovrd Requirement Designation' and two dropdown menus for 'Requirement Designation Option' and 'Requirement Designation Grade'. At the bottom of the page, there are links for 'Add Merge Process' and 'Class Block Defaults', and buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

If both class and student blocks have been created, you may use this link to begin the merge process using Block Enrollment

Use Class Block Defaults link to set defaults for this page

Go to: [Add Merge Process](#) [Class Block Defaults](#)

[Save](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)

Overrides

The Override area contains 13 possibilities to check override information for a particular enrollment transaction. Only the overrides that you are authorized to grant will be available to you.

Override Options:

- **Override Action Date** allows enrollment action to be back-dated
- **Override Appointment** allows enrollment prior to assigned appointment (queue)
- **Override Career** allows enrollment of a course outside of a student's career
- **Override Class Limit** allows enrollment in a closed class
- **Override Class Links** (*not in use*)
- **Override Class Units** (*not in use*)
- **Override Grading Basis** (*not in use*)
- **Override Permission** allows enrollment in a closed or restricted class
- **Override Service Indicators** allows a student to enroll by overriding negative service indicators
- **Override Requisites** allows enrollment into a course that requires instructor or department approval
- **Override Time Conflicts** allows enrollment of classes that have time conflicts
- **Override Unit Load** allows enrollment for over the maximum units allowed in student's program
- **Wait List Okay** (*not in use*)

Note: If desired, use the [Class Block Defaults](#) link at the bottom of the Block Enrollment page prior to setting up the Class block to speed up processing time

Block Enrollment Classes

Class Block Defaults

Academic Institution: UMNTC Univ of Minnesota, Twin Cities
Class Enrollment Block: YGRP9 Your Group Fall Sem
*Action/Reason:
Action Dt:

Overrides	
Access ID:	All Access
<input checked="" type="checkbox"/> Override Action Date	<input checked="" type="checkbox"/> Override Permission
<input type="checkbox"/> Override Appointment	<input checked="" type="checkbox"/> Override Requisites
<input type="checkbox"/> Override Career	<input type="checkbox"/> Ovrld Requirement Designation
<input type="checkbox"/> Override Class Limit	<input type="checkbox"/> Override Service Indicator
<input type="checkbox"/> Override Class Links	<input type="checkbox"/> Override Time Conflict
<input type="checkbox"/> Override Class Units	<input type="checkbox"/> Override Unit Load
<input type="checkbox"/> Override Grading Basis	<input type="checkbox"/> Wait List Okay

Block Enrollment

You may use the add merge process link at the bottom of Block Enrollment Classes page or follow the path below.

Records and Enrollment > Enroll Students > Block Enrollment > Block Enroll Merge

1. Select **Add a New Value** link to navigate into the Block Enrollment component. This will take you directly into the Block Enrollment process pages.

Block Enroll Merge

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

Enrollment Request ID:	begins with	<input type="text"/>	<input type="button" value="Search"/>
ID:	begins with	<input type="text"/>	
Academic Career:	=	<input type="text"/>	<input type="button" value="Search"/>
Academic Institution:	begins with	<input type="text"/>	<input type="button" value="Search"/>
Term:	begins with	<input type="text"/>	<input type="button" value="Search"/>
Class Nbr:	=	<input type="text"/>	
User ID:	begins with	<input type="text"/>	<input type="button" value="Search"/>
Campus ID:	begins with	<input type="text"/>	
National ID:	begins with	<input type="text"/>	
Last Name:	begins with	<input type="text"/>	
First Name:	begins with	<input type="text"/>	

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Select Add a New Value link

Block Enroll Merge Component

[Block Enroll Merge](#) | [Block Enroll Detail](#) | [Block Enrl Detail1](#) | [Block Enrl Detail2](#)

Enrollment Request ID: 0000000000 Request Status: Pending

Merge Blocks

Academic Institution:	<input type="text" value="UMNTC"/> <input type="button" value="Search"/>	Univ of Minnesota, Twin Cities	<input type="button" value="Merge"/>
Student Block:	<input type="text" value="YSB9"/> <input type="button" value="Search"/> Detail / Create	Your Student Block Fall Sem	
Class Block:	<input type="text" value="YCB9"/> <input type="button" value="Search"/> Detail / Create	Your Class Block Fall Sem	

Filtering Criteria

Academic Career:	<input type="text"/>	<input type="button" value="Retrieve"/>
Term:	<input type="text"/>	
Class Nbr:	<input type="text"/> <input type="button" value="Search"/>	Detail Status: <input type="text"/>
EmplID:	<input type="text"/>	

[Block Enroll Merge](#) | [Block Enroll Detail](#) | [Block Enrl Detail1](#) | [Block Enrl Detail2](#)

Block Enroll Merge

1. Enter or confirm Academic Institution.
2. Enter Student and Class Blocks, or use lookups to search.
3. Click on **Merge** button to merge the Student and Class Blocks together. (The Submit button will be grayed out.)
4. With the Request Status at Pending, click on **Submit** button to register students. (The Merge button will be grayed out.)
5. If request status returns with Success, all classes have been posted.

Resolving Error Messages

During the merge Process errors may occur and/or messages may be generated.

1. If request status returns with Errors, click on Retrieve button on the Block Enroll Merge page to bring you to the Block Enroll Detail page. This page allows the identification of errors and/or messages associated with the enrollment.

The screenshot displays the 'Block Enroll Merge' interface. At the top, there are four tabs: 'Block Enroll Merge', 'Block Enroll Detail', 'Block Enrl Detail1', and 'Block Enrl Detail2'. The 'Block Enroll Merge' tab is active. Below the tabs, the 'Enrollment Request ID' is 0000000337 and the 'Request Status' is 'Errors'. A yellow 'Submit' button is visible. Below this is the 'Merge Blocks' section, which includes input fields for 'Academic Institution', 'Student Block', and 'Class Block', each with a 'Detail / Create' link. A 'Merge' button is also present. Below the 'Merge Blocks' section is the 'Filtering Criteria' section, which includes input fields for 'Academic Career', 'Term', 'Class Nbr', and 'EmplID', each with a search icon. A 'Detail Status' dropdown menu is also present. A yellow 'Retrieve' button is located to the right of the 'Filtering Criteria' section. At the bottom of the interface, there is a row of buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', 'Add', and 'Update/Display'. A callout box labeled 'Errors returned' points to the 'Request Status' field. Another callout box labeled 'Click here to go to Block Enroll Detail page' points to the 'Retrieve' button. Below the interface, there is a breadcrumb trail: 'Block Enroll Merge | Block Enroll Detail | Block Enrl Detail1 | Block Enrl Detail2'.

- Click on Detail to view errors/messages associated with individual students and classes on the Block Enrl Detail 1 page.

Block Enroll Detail

[Block Enroll Merge](#) | [Block Enroll Detail](#) | [Block Enrl Detail1](#) | [Block Enrl Detail2](#)

Enrollment Request ID: 0000000337

Seq #	ID	Name	Term	Career	Class Nbr	Action	Status	DETAIL
1	2114840	Peterson, Tom	1069	UGRD	33167	Enroll	Errors	DETAIL
2	2200365	Smith20, Mary	1069	UGRD	33167	Enroll	Errors	DETAIL
3	2202230	Lea, Jon G	1069	UGRD	33167	Enroll	Success	DETAIL

Click here to view errors and/or messages

[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#) | [Notify](#) | [Refresh](#) | [Add](#) | [Update/Display](#)

[Block Enroll Merge](#) | [Block Enroll Detail](#) | [Block Enrl Detail1](#) | [Block Enrl Detail2](#)

Block Enrl Detail 1

[Block Enroll Merge](#) [Block Enroll Detail](#) [Block Enrl Detail1](#) [Block Enrl Detail2](#)

Enrollment Request ID: 0000000337

Enrollment Request Find | View All First 1 of 1 Last

ID: 2114840 Peterson, Tom Institution: Univ of Minnesota, Twin Cities
Career: Undergraduate Primary Prog: Institute of Technology Term: Fall 2006

Seq #	Action	Class Nbr	Grading Basis	Related 1	Related 2	Permission
1	Enroll	33167 Hist 1011 002	A-F			

World History I

Action Dt	Reason	Regular	Undergrad	Grade In	Units Taken
					4.00

Request Status: Errors User ID: SATRN20

Overrides

<input type="checkbox"/> Action Date	<input type="checkbox"/> Class Limit	<input type="checkbox"/> Grading Basis	<input type="checkbox"/> Service Indicator
<input type="checkbox"/> Appointment	<input type="checkbox"/> Class Links	<input type="checkbox"/> Permission	<input type="checkbox"/> Time Conflict
<input type="checkbox"/> Career	<input type="checkbox"/> Class Units	<input type="checkbox"/> Requisites	<input type="checkbox"/> Unit Load
			<input type="checkbox"/> Wait List Okay

Messages Find | View All First 1 of 1 Last

Message Sequence: 1 Severity: Error Last Update DateTime: 10/06/06 4:11:24PM
Hold on record, Add not processed. (14640,87)
There is a hold on this record, preventing the add from being processed. The hold must be removed to process the add transaction.

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

[Block Enroll Merge](#) | [Block Enroll Detail](#) | [Block Enrl Detail1](#) | [Block Enrl Detail2](#)

3. Use the Block Enrl Detail 1 to display errors for resolution through the use of appropriate overrides, or open up New Window to navigate elsewhere to resolve the errors.

Note: Each class that has an error must be resolved individually. If you are not able to resolve all errors that occur, they may be left unresolved or resolved later individually through the use of the Enrollment Request component.

4. Return to Block Enroll Merge to Submit Enrollment Request again.
5. You may use filtering criteria.

Note: Using the Return arrow on the web browser tool bar, or clicking between the tabs, may result in the system “losing its place”. You can always start a new block enrollment process.

Note: If some students were successfully posted to classes, while others were not, if you rerun the same block of students to correct the errors, the students who were successfully posted will now show up as errors, as they are already in the class. A printed list of the success/error page may be helpful.

Block Enrollment Detail 2

The Block Enrollment Detail 2 panel may be used to add Requirement Designations (not in use) to student enrollment requests. Notes, Repeat Codes, (limited use) and Independent Study Instructor IDs (not in use) may be added on this page.

Note: This page is not in general use.

Adding/Updating Hospitalization Insurance

Records and Enrollment> Enroll Students> Enrollment Request

1. Click on link to **Add a New Value**
2. 1. On Search Page, enter:

ID	ID# of student
Career	Academic Career of student e.g. UGRD, GRAD or Professional
Institution	Current Academic Institution
Term	Term of enrollment
3. Click on **Add**
Note: Use the lookup icon associated with the ID to bring up search options other than the ID number.

Two options exist in regards to the hospitalization fee. If no action is taken the fee is automatically charged to all degree seeking students taking more than six credits.


OR

Click the **INS** button on the Enrollment Request Page to verify, update or add hospitalization coverage. Clicking on this button will bring up the Hospitalization Insurance page where this information may be entered or altered by term

1. Accept the Default date, Effective Sequence and Status Active
2. Enter Insurance Company name (required field)
3. Enter Insurance Company's Phone (optional through Enrollment Request required for students on the web)
4. Enter Insurance ID# (required field)
5. Comments (optional)
6. Click Apply

Hospitalization Insurance page

Hospital Insurance

Tom Peterson 2114840 

Univ of Minnesota, Twin Cities
Undergraduate Fall 2006

*Effective Date: 10/09/2006 Effective Sequence: 0 *Status: Active

*Insurance Company: Student's Insurance Company

Insurance Company's Phone #: 987 654 3210

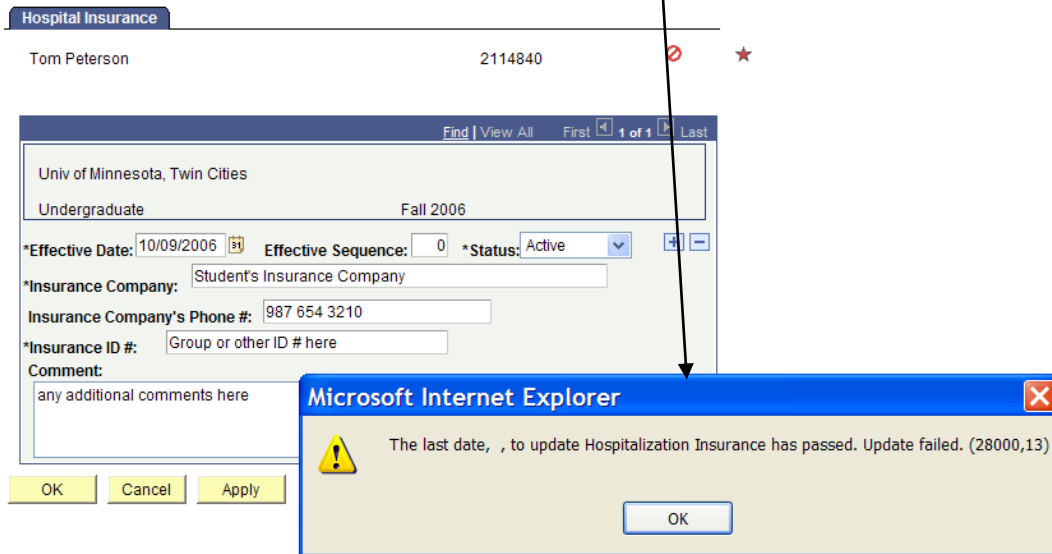
*Insurance ID #: Group or other ID # here

Comment:
any additional comments here

OK Cancel Apply


Insurance Button on Enrollment Request and Quick Enroll page – Cannot be updated after the update deadline of the end of the 2nd week of the term. Refer all late changes to Boynton Health Service.

Error associated with attempt to make a late update



Note: Hospitalization information is usually entered by the student on the web. If the registration change you are making results in the student reaching the sixth credit it is important that the student understands they will be charged if no hospitalization information is entered. If this is not an issue, in that the information has already been entered by the student or they wish to be covered, no action by staff regarding hospitalization is necessary.

Select Non-Mandatory Fees

1. Click the **Fees**  button on the Enrollment Request page. Clicking on this button will bring up a sub page where students may opt to pay or not pay these fees. If no action is taken and students are eligible they will be assessed these three fees. See the current class schedule for eligibility requirements.

Non-Mandatory Fees sub Page:

Non-Mandatory Fees Page

Tom Peterson ID: 2114840

MN Public Interest Research Group	Collegians for A Constructive Tomorrow
<input type="checkbox"/> Yes, Student wants to pay MPIRG	<input type="checkbox"/> Yes, Student wants to pay CFACT
<input type="checkbox"/> No, Student does NOT want to pay MPIRG	<input type="checkbox"/> No, Student does NOT want to pay CFACT

Student Legislative Coalition
<input type="checkbox"/> Yes, Student wants to pay SLC
<input type="checkbox"/> No, Student does NOT want to pay SLC

2. MN Public Interest Research Group (MPIRG)
Student Legislative Coalition (SLC)
Collegians for a Constructive Tomorrow (CFACT) Twin Cities only fee
 - If the student wishes to pay fee, click on the **Yes** checkbox.
 - If the student does not want to pay fee, click on the **No** checkbox.
3. Click the **OK** button to return to the Enrollment Request page and save the page

Note: When saving the page you will get the following error message “*Warning--- Changes won't be posted (14630,80)*”. This message may be ignored as the optional fees **will** be adjusted. If you are going on to make class changes such as dropping, adding, or changing the optional fee adjustments will be saved when the changes are submitted.

To move on to the next student, click the yellow Add button in the lower right of the screen. Repeat process for both Hospitalization and Fees.

Quick Steps to Block Enrollment

Create the Student Block:

Records and Enrollment > Enroll Students > Block Enrollment > Create Student Block

1. Add a new value (or display existing value to adjust existing student block)
2. Enter up to five character code of your own making and click on Add button
3. Enter description of code
4. Enter ID of first student and select Academic career
5. Add rows for each additional student
6. Save student block

Create the Class Block:

Records and Enrollment > Enroll Students > Block Enrollment > Create Class Block

1. Add a new value (or display existing values to adjust existing class block)
2. Enter up to five character code of your own making and click on Add button
3. Enter description of code
4. Enter term
5. Enter or search for class number, grading basis, and units
6. Select all appropriate overrides
7. Add rows and select additional classes as desired
8. Save class block

Block Enroll Merge

Records and Enrollment > Enroll Students > Block Enrollment > Block Enroll Merge

1. Select Add a New Value
2. Enter or lookup Student Block code
3. Enter or lookup Class Block code
4. Click on Merge button to merge Student and Class blocks
5. Click on Submit button to enroll
6. If Request Status is Successful, the process is completed
OR
7. If Request Status indicates Errors or Messages, click on Retrieve button to view
8. Block Enroll Detail
9. On the Block Enroll Detail page, use the Detail link to the right of the error/message to display enrollment request and resolve errors
10. Click on Submit button on Block Enroll Merge page, to resubmit and enroll student/s in classes